

RETENTION.LINK USER MANUAL

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Overview

General Overview

As the need to gain and retain customers with as little as much spend as possible becomes even more important, we must look to ensure that our processes allow us to actively follow a customers progression with our business and not let them get lost in the 'system'.

Retention.link is a unique module of Links Modular Solutions that allows users to setup step by step programs that are applied to a customer either at time of enquiry, or time of sale. That sale may be the purchase of a memberships, visit pass or even a booking into a class i.e. Swim Lesson.

The unique setup will alleviate the need for external programs outside links to track and manage enquiries. It also ensures that regular contact can be maintained with customers and their contact tracked and managed throughout their time as a customer with the business.

Prospect Programs

Retention.link allows you to setup two types of programs that will be applied to prospects as they are entered into the database. Mandatory fields can be set for collection so that no prospect can be saved without the application of information such as Source of Enquiry and Type of Enquiry.

Depending on the prospect program you design, the system could prompt users to follow up enquiries with a phone call, two days after their centre tour, or to send a letter if they still haven't joined after three weeks for example.

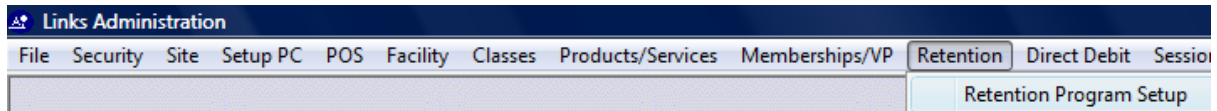
The automatic application of a prospect to the program you design will ensure that provided a prospect is entered into the database with at least their first name and surname, there is no way they can fall through the cracks.

Retention Programs

It is no secret that it is much cheaper to retain an existing customer than to gain a new one. However due to the manual work involved up until now, our retention strategies have often been limited by what we can offer based on our balance or staffing costs to retention financial gains. The retention programs within retention.link allow users to setup a specific order of steps that are followed by the customer throughout their time with your business. Whether follow up reminders are set for Fitness Consultations or Programs Shows, or it is simply a phone call to see how they are enjoying their time with you, the retention program allows you to have automatic control and not be reliant upon manual systems.

Setting up your prospect programs

Prospect programs are designed to allow users to automatically set follow up reminders for prospective customers. It will also allow management to report on at what stage prospects are being converted to customers, and therefore to track which processes are effective.



Program Settings

1. The screen will open with only the Program Code & Name fields available

The screenshot shows the 'Retention Program Setup' window. It has two tabs: 'Retention Program Setup' and 'Retention Settings'. The 'Retention Program Setup' tab is active. It contains two input fields: 'Program Code:' and 'Program Name:'. Both fields are currently empty and have a red background.

2. Enter a code and description to activate the remainder of the screen
For example
 - a. CODE = NEWENQ
 - b. DESCRIPTION = NEW ENQUIRY
3. Select that the program is a PROSPECT PROGRAM

The screenshot shows the 'Retention Program Setup' window with the 'Retention Settings' tab selected. The 'Program Code' field is populated with 'NEWENQ' and the 'Program Name' field is populated with 'NEW ENQUIRY'. The 'Active' checkbox is checked. The 'Retention Program is to be used for:' section has 'Prospect' selected with a radio button. The 'Default Retention Program' checkbox is unchecked.

4. You can now begin to enter the steps that relate to the program
5. Enter a step description

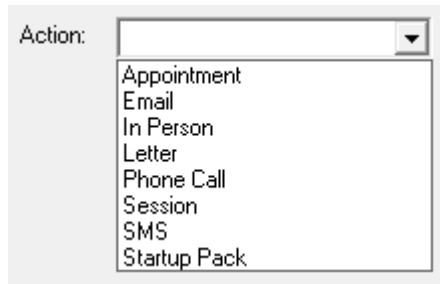
The screenshot shows the 'Add New Step' dialog box. It has two input fields: 'Step #' and 'Step Name:'. The 'Step #' field is populated with '1' and the 'Step Name:' field is populated with 'Centre Tour'.

6. Enter the staff member or team that will complete the task. If sales staff is selected then when a customer is assigned to a program, it will ask the user which staff member the steps should be assigned to.

The screenshot shows the 'Assign To' dialog box. It has two radio buttons: 'Sales Staff' and 'By Role'. The 'By Role' radio button is selected. Below the radio buttons is a dropdown menu with the following options: Lifeguard, Swim Teacher, and Customer Service. The 'Action:' field is also visible.

Action Types

7. Enter the action type for the step



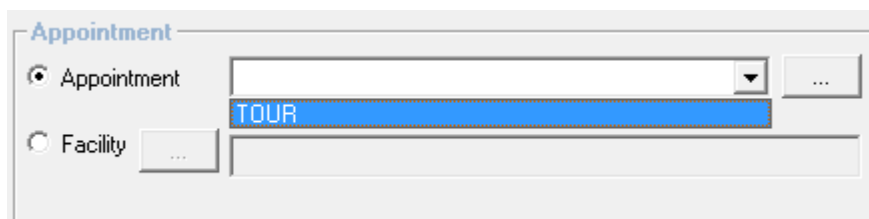
The screenshot shows a web form with a label 'Action:' followed by a dropdown menu. The dropdown is open, displaying a list of action types: Appointment, Email, In Person, Letter, Phone Call, Session, SMS, and Startup Pack.

The options available for each action will vary depending on the action type selected. Below will show and explain each of the options available.

Appointment

Either the appointments scheduler in pos.link or facility.link can be used for retention step appointments. The benefits vary depending on the outcome required. The appointments scheduler is simple and basic to use, but has no billing options. The facility bookings module requires more setup but can have multiple facilities (or trainers) viewed at any one time and charges can be applied if required.

At each step level, you can choose which 'appointment' is selected. This will enable the users when actioning a customer's step access the correct appointment/facility type automatically.

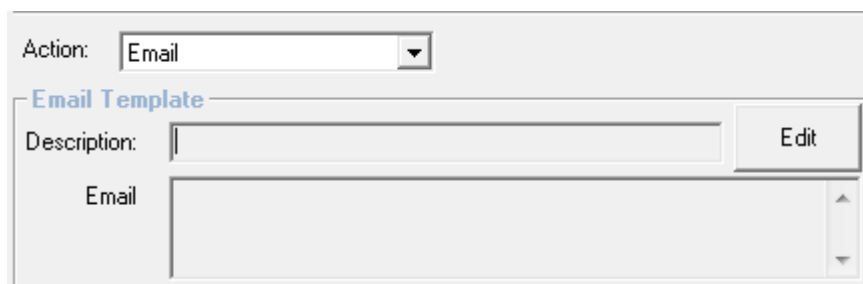


The screenshot shows a form titled 'Appointment'. It has two radio buttons: 'Appointment' (which is selected) and 'Facility'. Next to the 'Appointment' radio button is a dropdown menu showing 'TOUR'. There is also a small '...' button next to the dropdown.

Please note - For the appointment type to show up in the drop menu you must have selected Sales Reporting in the appointment type setup.

Email

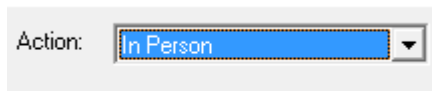
An email template can be applied to the step, by the same manner that it is applied to a non attendance reminder. See the System Settings section of this manual for further information.



The screenshot shows a form with a label 'Action:' followed by a dropdown menu showing 'Email'. Below this is a section titled 'Email Template'. It contains a 'Description:' label next to a text input field, and an 'Edit' button. Below the description field is a large text area labeled 'Email' for the email body.

In Person

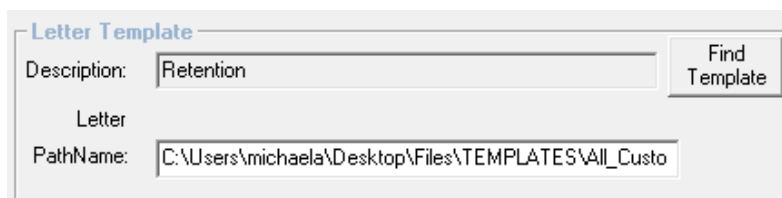
An action type of In Person is available; however it is assumed that this action type will be used when manual follow up is required.



A screenshot of a software interface showing a dropdown menu labeled 'Action:'. The menu is open, and 'In Person' is selected and highlighted in blue. The dropdown arrow is visible on the right side of the menu.

Letter

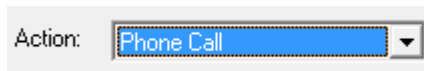
A letter template can be applied to the step provided it has been setup in the Letter Templates screen. See the System Settings section of this document for further information.



A screenshot of a 'Letter Template' dialog box. It has a title bar 'Letter Template'. Inside, there is a 'Description:' label followed by a text box containing 'Retention'. To the right of this is a 'Find Template' button. Below the description is a 'Letter' label followed by a 'PathName:' label and a text box containing 'C:\Users\michaela\Desktop\Files\TEMPLATES\All_Custo'. The dialog box has a standard Windows-style border.

Phone Call

If the action type is phone call, then there is no templates or automation required



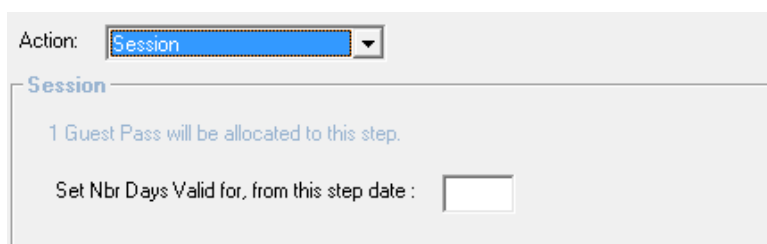
A screenshot of a software interface showing a dropdown menu labeled 'Action:'. The menu is open, and 'Phone Call' is selected and highlighted in blue. The dropdown arrow is visible on the right side of the menu.

Session

You may wish to have a step that is a session for example;

- Trial a group exercise class
- Trial the Living Longer Living Stronger program

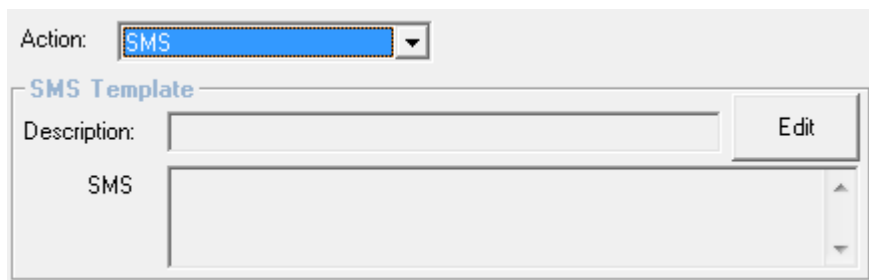
As the user is not yet a member, then a guest pass is allocated to the prospect so that they can access the session. You can choose a number of days that this guest pass stays valid for from the step date. For example the step is 7 days in the prospects program, and you want the pass to be valid for a further 7 days, in case it takes them another week to attend a session.



A screenshot of a 'Session' dialog box. It has a title bar 'Session'. Inside, there is an 'Action:' label followed by a dropdown menu showing 'Session'. Below this is a text box containing '1 Guest Pass will be allocated to this step.' Below that is a label 'Set Nbr Days Valid for, from this step date :' followed by a text box. The dialog box has a standard Windows-style border.

SMS

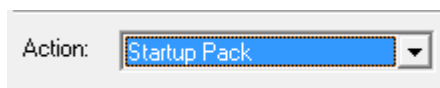
You can assign an SMS template to the step. See the System Settings session of this document.



The screenshot shows a configuration window for SMS. At the top, there is a label 'Action:' followed by a dropdown menu with 'SMS' selected. Below this is a section titled 'SMS Template'. Inside this section, there is a label 'Description:' followed by a text input field. To the right of the input field is an 'Edit' button. Below the input field, the text 'SMS' is displayed next to a large, empty text area with a vertical scrollbar on the right side.

Start Up Pack

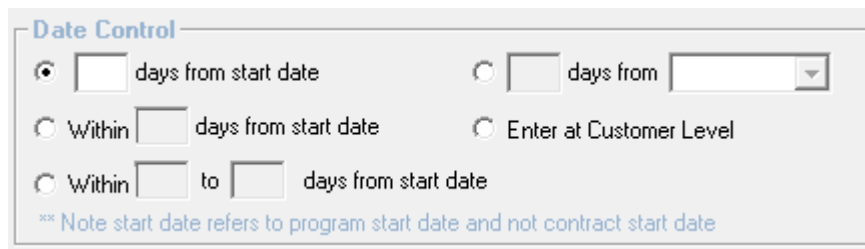
This action type may not be so relevant to Prospects however it can be used if required. The startup pack step will notify the user at Point of Sale when an attendance is recorded for the prospect/customer. Further information is discussed in the retention program setup section of this document.



The screenshot shows a configuration window for the Start Up Pack. It features a label 'Action:' followed by a dropdown menu with 'Startup Pack' selected.

Date Control

8. Enter the date control for this step
9. There are 5 date options available



The screenshot shows a 'Date Control' dialog box with the following options:

- ☒ [] days from start date
- ☐ [] days from []
- ☐ Within [] days from start date
- ☐ Enter at Customer Level
- ☐ Within [] to [] days from start date

xx Note start date refers to program start date and not contract start date

days from start date

This will make the step due at a number of days for example

- Program is started on July 1st
- Date control for step is 7 days from start date
- The step becomes due on July 8th

days from a Step

This will make the step due the set number of days after the selected step.

Within # days from start date

If this option is selected the step will show as due for all the days between the start of the program and the final day it is due. For example;

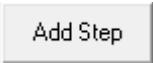

- Program starts on July 1st
- Date control for step is within 7 days from start date
- The step shows as due on;
 - July 1st, 2nd, 3rd, 4th, 6th, 7th & 8th

Within # to # days from start date

This will allow the step to display similar to within # days from start however the first date is not from the start of the program. For example within 7 to 14 days of the program start date.

10. Enter a description for the step if required. You may to for example enter what should be said in a phone call for this step. The description will show in the customers tracking screen so that staff can see what is required from the step.

Description:

11. Once all of the details of the step have been entered, click on the  button
12. You are now ready to add the next step of your program
13. Continue until all steps are completed and the click on the  button

Setting up your retention programs

Overview

Retention programs may vary depending on the customer groups that you have attend your facility. For example you may have 8 different retention programs;

- New Full Access Members
- Existing Full Access Members
- New PT Members
- Existing PT Members
- New Swim School Students
- Existing Swim School Students
- New Aquatic Members
- Existing Aquatic Members

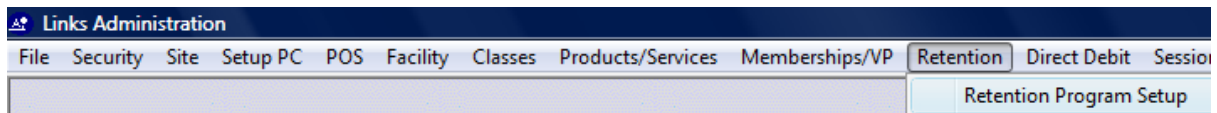
Retention programs can be restricted by customer groups

- Members
- Visit Pass Holders
- Students

Within those groups membership/visit pass types and also class types can be limited.

For example, the New Full Access Members retention program only applies to Full Access Membership Types and not Aquatic Only Membership types.

Adding a Retention Program



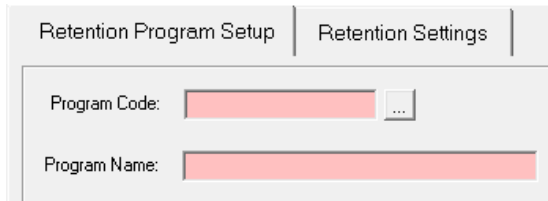
Links Administration

File Security Site Setup PC POS Facility Classes Products/Services Memberships/VP Retention Direct Debit Session

Retention Program Setup

Program Settings

14. The screen will open with only the Program Code & Name fields available



Retention Program Setup Retention Settings

Program Code:

Program Name:

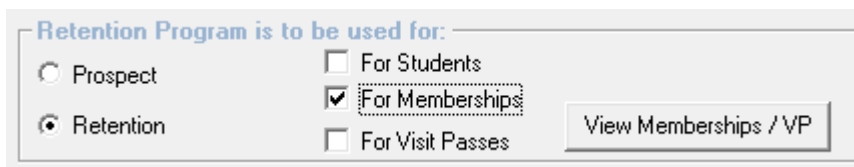
15. Enter a code and description to activate the remainder of the screen

For example

- CODE = NEWFAMEM
- DESCRIPTION = NEW FULL ACCESS MEMBER

16. Select that the program is a RETENTION PROGRAM

17. Select which customer group/s it is relevant to

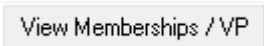


Retention Program is to be used for:

☐ Prospect ☐ For Students

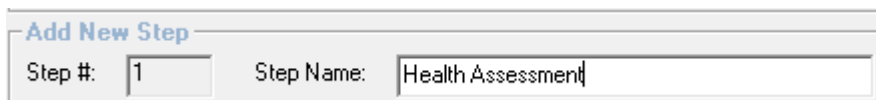
☒ Retention ☒ For Memberships

☐ For Visit Passes View Memberships / VP

18. Click on the  button to isolate certain membership types or leave to include all types

19. You can now begin to enter the steps that relate to the program

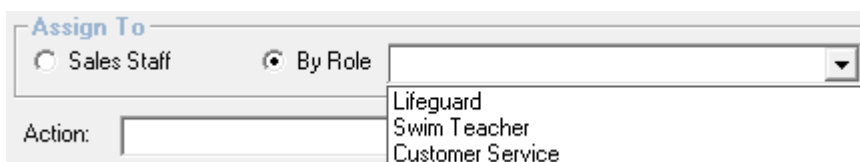
20. Enter a step description



Add New Step

Step #: Step Name:

21. Enter the staff member or team that will complete the task. If sales staff is selected then when a customer is assigned to a program, it will ask the user which staff member the steps should be assigned to.



Assign To

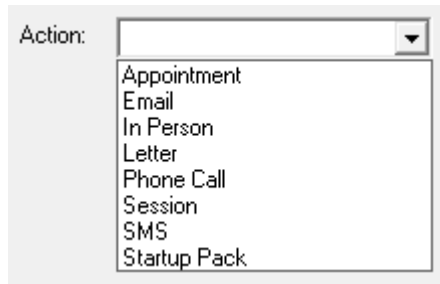
☐ Sales Staff ☒ By Role

Action:

Lifeguard
Swim Teacher
Customer Service

Action Types

22. Enter the action type for the step



The screenshot shows a web form with a label 'Action:' followed by a dropdown menu. The dropdown is open, displaying a list of action types: Appointment, Email, In Person, Letter, Phone Call, Session, SMS, and Startup Pack.

The options available for each action will vary depending on the action type selected. Below will show and explain each of the options available

Appointment

Either the appointments scheduler in pos.link or facility.link can be used for retention step appointments. The benefits vary depending on the outcome required. The appointments scheduler is simple and basic to use, but has no billing options. The facility bookings module requires more setup but can have multiple facilities (or trainers) viewed at any one time and charges can be applied if required.

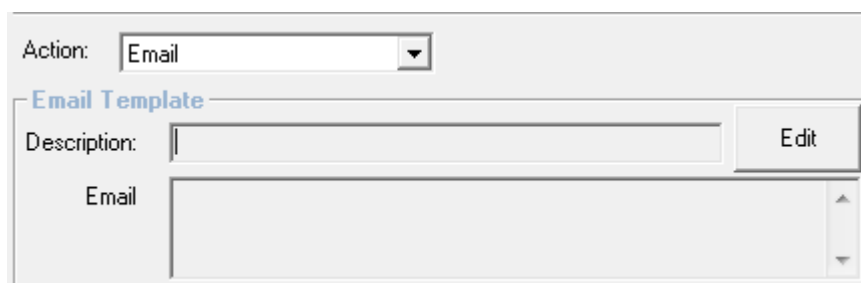
At each step level, you can choose which 'appointment' is selected. This will enable the users when actioning a customer's step access the correct appointment/facility type automatically.



The screenshot shows a web form with a label 'Action:' followed by a dropdown menu set to 'Appointment'. Below this, there is a section titled 'Appointment' with two radio buttons. The 'Appointment' radio button is selected, and the 'Facility' radio button is also selected. The 'Facility' field is a text input with a dropdown arrow and a button with three dots, showing the value 'HEALTH CLUB'.

Email

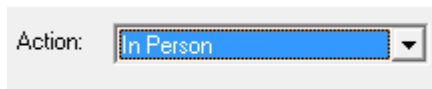
An email template can be applied to the step, by the same manner that it is applied to a non attendance reminder. See the System Settings section of this manual for further information.



The screenshot shows a web form with a label 'Action:' followed by a dropdown menu set to 'Email'. Below this, there is a section titled 'Email Template' with a 'Description:' label and a text input field. To the right of the text input field is a button labeled 'Edit'. Below the 'Description:' field is a large text area labeled 'Email'.

In Person

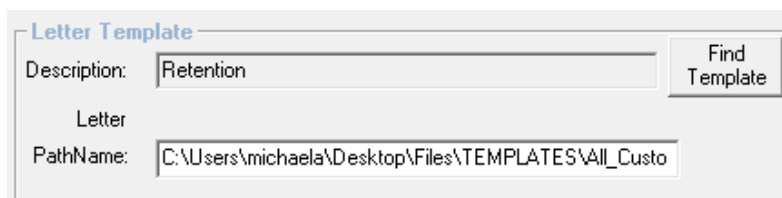
An action type of In Person is available; however it is assumed that this action type will be used when manual follow up is required.



Action: In Person

Letter

A letter template can be applied to the step provided it has been setup in the Letter Templates screen. See the System Settings section of this document for further information.



Letter Template

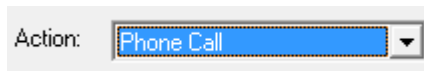
Description: Retention Find Template

Letter

PathName: C:\Users\michaela\Desktop\Files\TEMPLATES\All_Custo

Phone Call

If the action type is phone call, then there is no templates or automation required



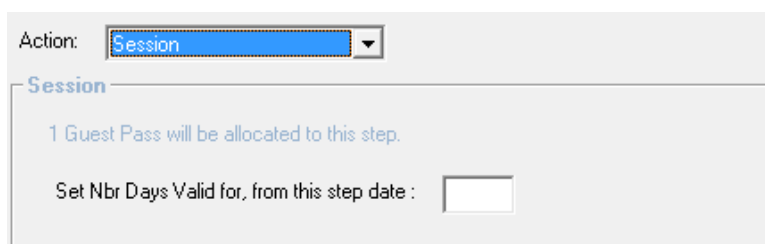
Action: Phone Call

Session

You may wish to have a step that is a session for example;

- Trial a group exercise class
- Trial the Living Longer Living Stronger program

As the user is not necessarily a member that is valid to go that session, then a guest pass is allocated to the customer so that they can access the session. You can choose a number of days that this guest pass stays valid for from the step date. For example the step is 7 days in the prospects program, and you want the pass to be valid for a further 7 days, in case it takes them another week to attend a session.



Action: Session

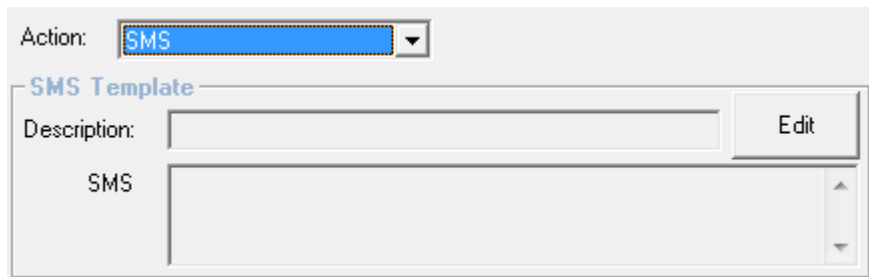
Session

1 Guest Pass will be allocated to this step.

Set Nbr Days Valid for, from this step date :

SMS

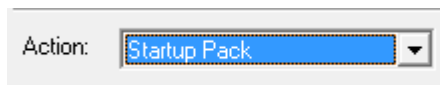
You can assign an SMS template to the step. See the System Settings session of this document.



The screenshot shows a configuration window for SMS. At the top, there is a label 'Action:' followed by a dropdown menu with 'SMS' selected. Below this is a section titled 'SMS Template'. Inside this section, there is a label 'Description:' followed by a text input field. To the right of the input field is an 'Edit' button. Below the input field, the word 'SMS' is displayed, followed by a large, empty text area with a vertical scrollbar on the right side.

Start Up Pack

The start up pack step is designed so that if you wish to give a pack to a customer either when they first join or after sometime of being a customer then this step can be assigned with the relevant date. Quite often start up or joining packs are made up of physical items that can run out. If at the time of the start up pack being due to be handed out items is not available this step can be postponed until a later date. When the step is then due again this will show through card swipe, (customer attendance).



The screenshot shows a configuration window for the Start Up Pack. It features a label 'Action:' followed by a dropdown menu with 'Startup Pack' selected.

Date Control

23. Enter the date control for this step

24. There are 5 date options available

Date Control

☒ [] days from start date ☐ [] days from [dropdown]

☐ Within [] days from start date ☐ [] days from [dropdown] completion date

☐ Within [] to [] days from start date

** Note start date refers to program start date and not contract start date

days from start date

This will make the step due at a number of days. For example:

- Program is started on July 1st
- Date control for step is 7 days from start date
- The step becomes due on July 8th

days from a Step

This will make the step due the set number of days after the select step

days from a Completed Step

This date control allows you to set a due date of a step by the completion date of a previous step on which it is dependent on.

For example: If you would like to set a follow up call step after a centre tour has been completed you would use this date control. As soon as the booking is made the due date of any dependent steps are updated and in this case the followup call due date would be updated.

If the appointment is missed and re booked the due date is update so that the due date of the dependent step, the follow up call is still dependent on the completion of the tour step.

Within # days from start date

If this option is selected the step will show as due for all the days between the start of the program and the final day it is due. For example;

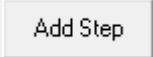
- Program starts on July 1st
- Date control for step is within 7 days from start date
- The step shows as due on;
 - July 1st, 2nd, 3rd, 4th, 6th, 7th & 8th

Within # to # days from start date

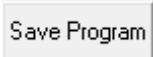
This will allow the step to display similar to within # days from start however the first date is not from the start of the program. For example within 7 to 14 days of the program start date.

25. Enter a description for the step if required. You may to for example enter what should be said in a phone call for this step. The description will show in the customers tracking screen so that staff can see what is required from the step.



26. Once all of the details of the step have been entered, click on the  button

27. You are now ready to add the next step of your program

28. Continue until all steps are completed and the click on the  button

System Settings

Administration>Retention Menu>Retention Program Setup

There are some system settings that can be applied by location to the retention programs. These include non attendance reminders and general tasks to do.

Salesperson is Mandatory on all contracts

If this option is selected a membership contract cannot be sold unless a sales person id is assigned to the sale. The field will show as mandatory in the contract sales screen and the user will be prompted to complete this field before the membership can be processed.

☒ Salesperson is Mandatory on all Contracts

Details

Date Started: 6 AUG 2008 D Edit Link >>

Expiry:

Consultant: 1 TRAINING, TRAINING

Ref:

Sales Person: [Red Highlight] ...

Family >>

Non Attendance Reminders

Administration>Retention> Retention Settings

To avoid the need to ensure that staff members are running reports to follow up on non attendance of membership holders these reminder parameters can be used to display customers on the sales management screen.

The criteria for the non attendance is that no attendance has been recorded against their membership contract are as many days as specified. The customer will continue to show until they have either attended or been marked as contacted.

Non-Attendance

		Action:	Template:	Template Set:
1st Contact:	30 days	SMS	...	✓
2nd Contact:	60 days	Phone Call	...	N/A
3rd Contact:	90 days	Letter	...	✓

For example;

Settings are for 30 days, 60 days and 90 days

A customer has not visited for 30 days

- They display in the 1st period of non attendance follow-ups

The customer is then contacted but doesn't attend

- They are removed from the 30 days contact list

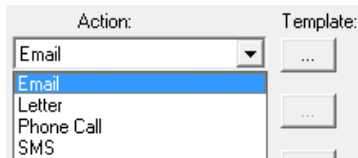
The customer then doesn't attend for a further 30 days so now 60 days in total

- The customer again appears on the 60 day follow up list and will be contacted again by the action set


Setting the templates

To assist automation of follow ups, users can set a template for a range of follow up methods including SMS, Emails & Letters.

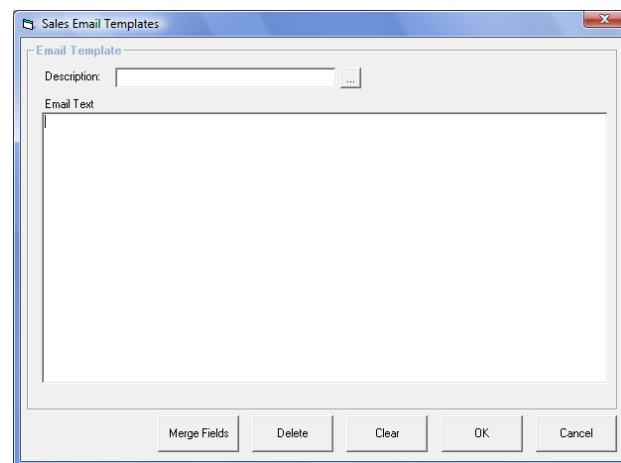
1. Chose the follow up method




The screenshot shows a software interface with two sections: 'Action:' and 'Template:'. Under 'Action:', there is a dropdown menu with the following options: 'Email' (highlighted in blue), 'Letter', 'Phone Call', and 'SMS'. To the right of the dropdown is a button with three dots (...).

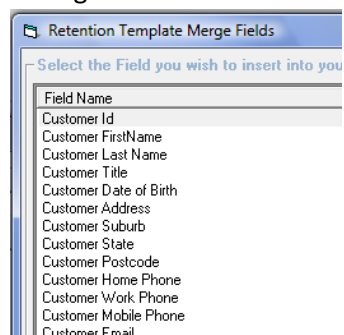
2. Click on the  button to apply a template
3. The follow screen will appear depending on the action type selected

Email



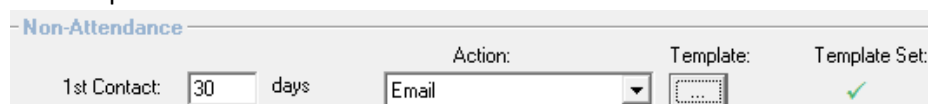
The screenshot shows a window titled 'Sales Email Templates'. Inside, there is a section 'Email Template' with a 'Description:' text box and a large 'Email Text' text area. At the bottom, there are five buttons: 'Merge Fields', 'Delete', 'Clear', 'OK', and 'Cancel'.

1. Enter an Email Template Description i.e. 30 day follow up email
2. Enter the text of the email template
 - a. Merge fields can also be included by selecting the  button
 - b. A range of fields are available



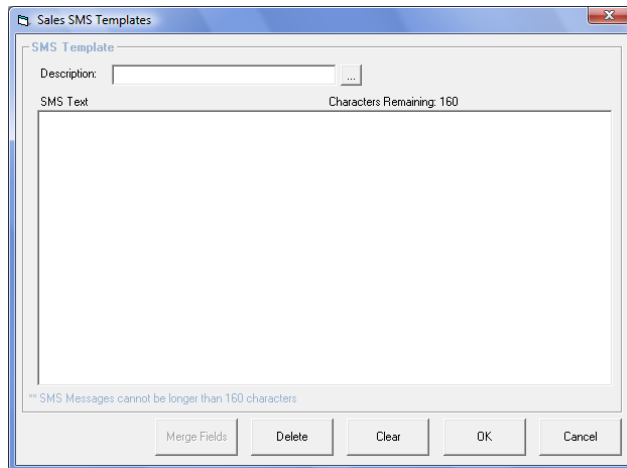
The screenshot shows a dialog box titled 'Retention Template Merge Fields'. It contains a list of fields under the heading 'Select the Field you wish to insert into you'. The fields are: Customer Id, Customer FirstName, Customer Last Name, Customer Title, Customer Date of Birth, Customer Address, Customer Suburb, Customer State, Customer Postcode, Customer Home Phone, Customer Work Phone, Customer Mobile Phone, and Customer Email.

3. Click on OK to save the template
4. The template will now show as set




The screenshot shows a section titled 'Non-Attendance'. It includes a '1st Contact:' field with the value '30' and the unit 'days'. Next to it is an 'Action:' dropdown menu with 'Email' selected. To the right is a 'Template:' field with a button showing a dotted box icon. Further right is a 'Template Set:' label with a green checkmark icon.

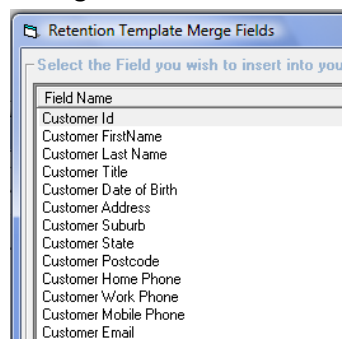
SMS



The 'Sales SMS Templates' dialog box is shown. It has a title bar with a close button. Inside, there's a section titled 'SMS Template' with a 'Description:' label and a text input field. Below this is a large 'SMS Text' area. To the right of the 'SMS Text' area, it says 'Characters Remaining: 160'. At the bottom, there's a note: '* SMS Messages cannot be longer than 160 characters'. At the very bottom are five buttons: 'Merge Fields', 'Delete', 'Clear', 'OK', and 'Cancel'.

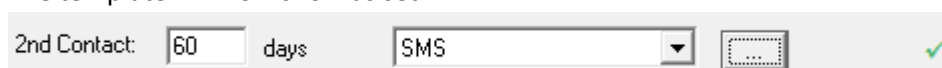
5. Enter a SMS Template Description i.e. 60 day follow up SMS
6. Enter the text of the SMS template

- a. Merge fields can also be included by selecting the  button
- b. A range of fields are available



The 'Retention Template Merge Fields' dialog box is shown. It has a title bar. Inside, it says 'Select the Field you wish to insert into you'. Below this is a list of fields: 'Field Name', 'Customer Id', 'Customer FirstName', 'Customer Last Name', 'Customer Title', 'Customer Date of Birth', 'Customer Address', 'Customer Suburb', 'Customer State', 'Customer Postcode', 'Customer Home Phone', 'Customer Work Phone', 'Customer Mobile Phone', and 'Customer Email'.

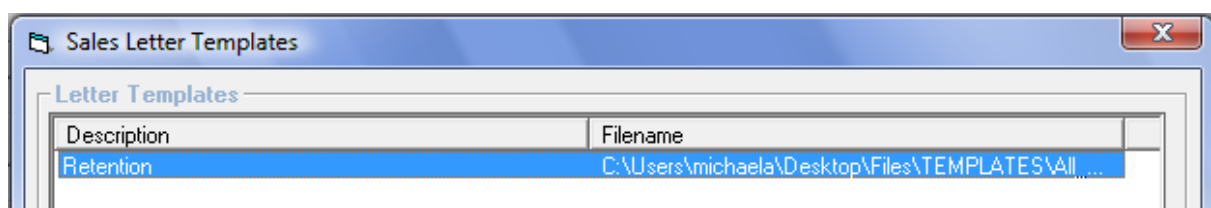
7. Click on OK to save the template
8. The template will now show as set



The SMS template configuration bar is shown. It contains the text '2nd Contact:' followed by a text input field containing '60', the word 'days', another text input field containing 'SMS', a dropdown arrow, a button with a dotted box icon, and a green checkmark.

Letter

When you select the letter option the letters that have been pre assigned to the retention data source will be viewable. You can select on of these letters for assignment to the non attendance reminder. See the Letter Templates section of this manual for further information.



The 'Sales Letter Templates' dialog box is shown. It has a title bar with a close button. Inside, there's a section titled 'Letter Templates'. Below this is a table with two columns: 'Description' and 'Filename'. The first row is 'Retention' with the filename 'C:\Users\michaela\Desktop\Files\TEMPLATES\All ...'.

Adding Letter Templates

Before letter templates can be assigned to steps or non attendance reminders, they must first be setup in the letter templates screen. This screen is found in **Administration>Letters>Templates**. The data source for these is Retention. If you are unsure how to setup letter templates, please see the Administration Manual for further information.

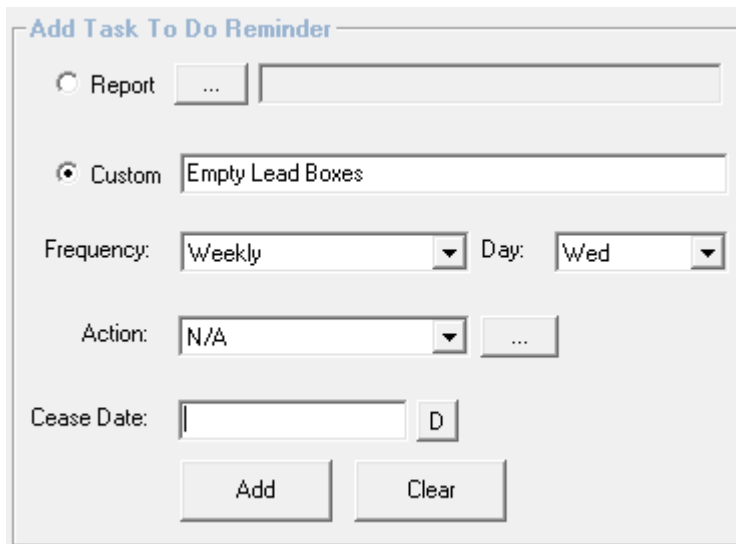
Setting tasks to do reminders

To avoid the missing of standard tasks, follow up reminders can be set for staff to mark that they have completed them. These may include items such;

- Empty Lead Boxes
- Hand out 7 day passes in the gym
- Contact Expired Members

You can also select to set reminders on reports so that they are not missed in either being printed or a mail merge sent from them.

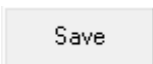
1. Choose either a report or enter a custom follow up reminder
2. Select the frequency
3. Enter the day (applicable for weekly and fortnightly)
4. Enter an action i.e. Print, Email, Mail Merge, Call or N/A these are setup as contact methods and can be added to as required
5. If this is only a short term task then a Cease Date can be entered, this may be applicable to tasks that are only valid for certain promotions



The screenshot shows a dialog box titled "Add Task To Do Reminder". It contains the following fields and controls:

- Report:** A radio button followed by a text box containing "...".
- Custom:** A radio button followed by a text box containing "Empty Lead Boxes".
- Frequency:** A dropdown menu showing "Weekly".
- Day:** A dropdown menu showing "Wed".
- Action:** A dropdown menu showing "N/A" followed by a button with "...".
- Cease Date:** A text box followed by a button with "D".
- Buttons:** "Add" and "Clear" buttons at the bottom.

Finalisation of Settings

Once all settings have been entered you must click on the  button to ensure that all settings are saved into the system.

Example Settings Screen

Retention Program Setup

Retention Settings

☒ Salesperson is Mandatory on all Membership Contracts

No Sale Return Timeframe: Hrs: Mins:

Number of Days between membership contracts to be considered an ongoing member:

Non-Attendance

		Action:	Template:	Template Set:
1st Contact:	<input type="text" value="14"/> days	<input type="text" value="SMS"/>	<input type="text" value="..."/>	<input checked="" type="checkbox"/> ✓
2nd Contact:	<input type="text" value="21"/> days	<input type="text" value="Phone Call"/>	<input type="text" value="..."/>	N/A
3rd Contact:	<input type="text" value="60"/> days	<input type="text" value="Phone Call"/>	<input type="text" value="..."/>	N/A

New Membership

☒ Show Customer Screen
☐ Show Prospect Screen

New Visit Pass

☒ Show Customer Screen
☐ Show Prospect Screen

Add Task To Do Reminder

☒ Report
☐ Custom

Frequency: Day:

Action:

Cease Date: D

Assign to Role:

Type	Description	Frequency	Action
Custom	Cleaning the sales presentation area	Weekly (Fri)	N/A
Report	Current Contracts	Weekly (Mon)	Print
Report	Mem/Vp Holders	Daily	

Save

Cancel

<< Back

Next >>

Finish

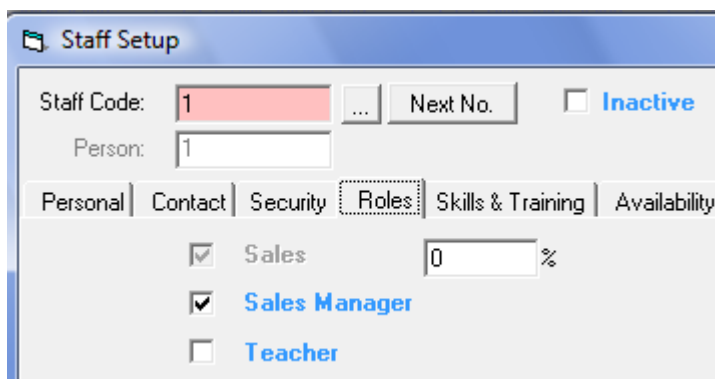
Sales Managers & Sales Staff Members

ADMINISTRATION>SECURITY>STAFF MEMBERS

There are certain functions that can only be completed by sales managers, for example;

- Viewing the entire workload
- Removing steps from a customer's program

To mark a staff member as a sales manager, check the option as sales manager.



The screenshot shows a 'Staff Setup' dialog box with the 'Roles' tab selected. The 'Staff Code' field contains '1' and is highlighted in red. There is a 'Next No.' button and an 'Inactive' checkbox. The 'Person' field contains '1'. The 'Roles' tab is active, showing a list of roles with checkboxes: 'Sales' (checked), 'Sales Manager' (checked), and 'Teacher' (unchecked). A percentage field next to 'Sales' shows '0 %'.

Role	Checked
Sales	✓
Sales Manager	✓
Teacher	✗

Assigning a customer to a program

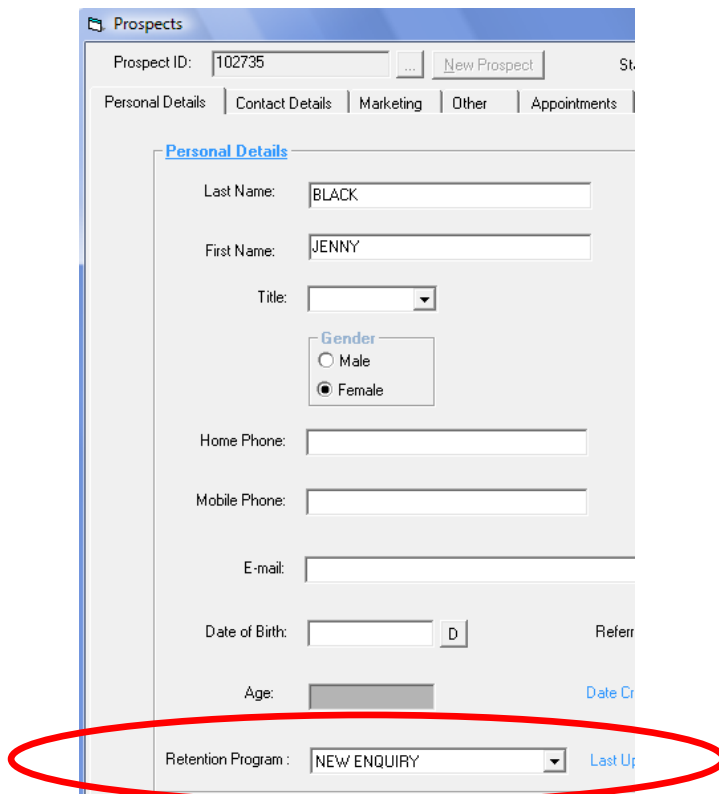
Overview

Prospects, Members, Visit Pass Holders and Students can be assigned to a prospect or retention program as a part of their customer setup or sale. Any other customer group can also be assigned to a program manually. The drop down menus available for selection are automatically populated with the default program if a default is setup in the retention program setup screen.

Assigning Prospects to a Program

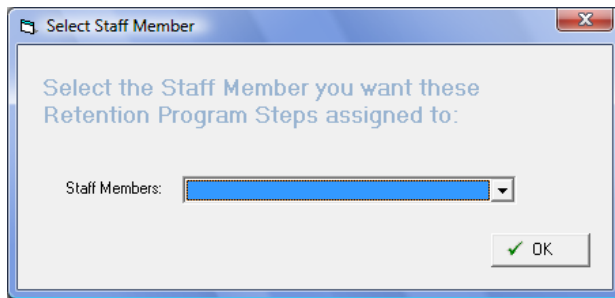
POS> CUSTOMERS>PROSPECTS

When you enter a prospect the prospect programs drop down will only be populated with those programs that are set for Prospects. This drop down is viewable in the bottom left and corner of the Personal Details tab. The prospect screen is designed to work from left to right. The final tab is the tracking tab, whereby you can view the steps that are a part of the program you have selected. See managing customers for further information on the view of these steps.



The screenshot displays the 'Prospects' application window. At the top, there's a 'Prospect ID' field with the value '102735' and a 'New Prospect' button. Below this is a tabbed interface with 'Personal Details', 'Contact Details', 'Marketing', 'Other', and 'Appointments'. The 'Personal Details' tab is active, showing fields for 'Last Name' (BLACK), 'First Name' (JENNY), 'Title' (a dropdown), 'Gender' (radio buttons for Male and Female, with Female selected), 'Home Phone', 'Mobile Phone', 'E-mail', 'Date of Birth' (with a 'D' button), 'Age', and 'Referral'. At the bottom, the 'Retention Program' dropdown is highlighted with a red oval and shows 'NEW ENQUIRY'. A 'Last Up' link is visible to the right of this dropdown.

If the program you have selected has steps that are assigned to an individual sales staff member then the following screen will appear where you can select which staff member you wish the steps to be assigned to.



Assigning Members to a Program

When you sell a membership contract the retention program drop down list is available in the bottom right hand corner of the screen. Again the default program will be listed here if one is setup as a default.

New Membership Contract

CustomerID: 102735 Name: BLACK, JENNY Gender: F

New Contract Details
 M'shp: M101 History >> Term: 6 month Details ...
 GOLD 6 MONTHS

Details
 Date Started: 6 AUG 2008 D Edit Link >>
 Expiry: 5 FEB 2009
 Consultant: 1 TRAINING, TRAINING
 Ref:
 Sales Person: 1 TRAINING, TRAINING
 Family >>

Payment
 UPFRONT
 Price: \$ 194.00
 Contract Price: \$ 194.00 Discount: 0 %
 Discount Reason:

Joining Fee
 Amount: \$ 0.00 Contract: \$ 0.00
☐ Pay On Exit
 Amount: \$ 0.00 Contract: \$ 0.00
☐ Pay On Exit

Suspension Fee
 Amount: \$ 0.00 Contract: \$ 0.00
 Discount: 0 %
 Discount Reason:

Total Contract Price

Item	Amount, \$
Contract Fee	194.00
Total	194.00

Due Now

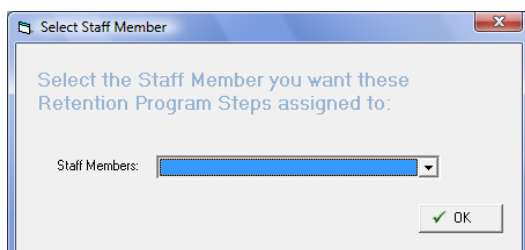
Item	Amount, \$
Contract Fee	194.00
Total	194.00

Pay Now: \$ 194.00

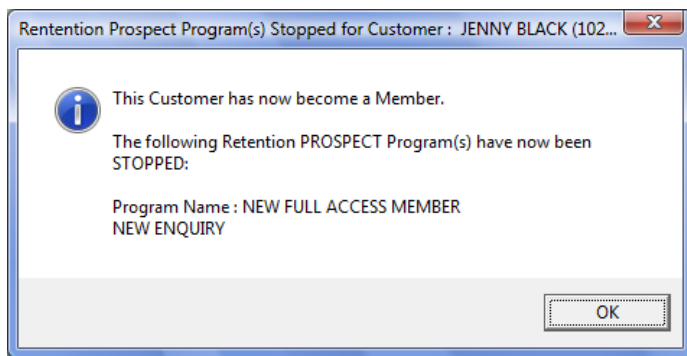
Sales Program: NEW CUSTOMER

Buttons: Setup Letter Letter Marketing OK Cancel Apply

If the program you have selected has steps that are assigned to an individual sales staff member then the following screen will appear where you can select which staff member you wish the steps to be assigned to.

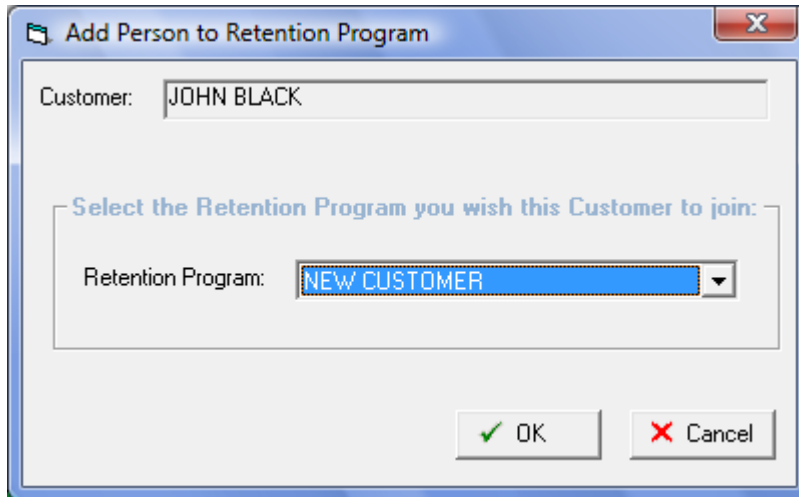


In the case where a customer was already on a prospect program this program will be stopped by the purchase of a membership



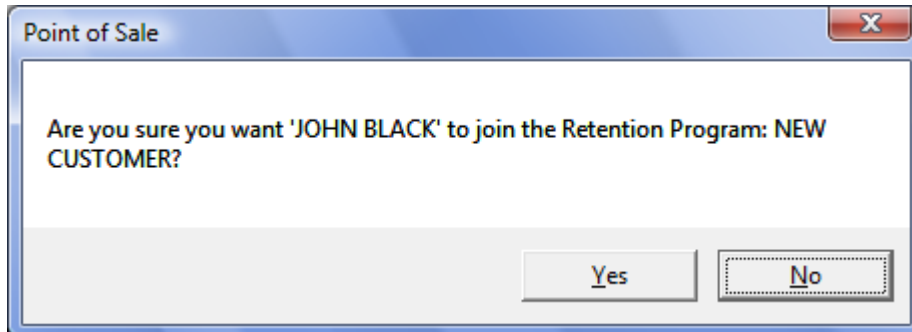
Assigning Visit Pass Holders to a Program

A separate screen is displayed when a customer is sold a visit pass that is allocated to a sales program. This screen will not be displayed unless the visit pass type is assigned to a particular sales program. This screen is displayed after the transaction is finalised



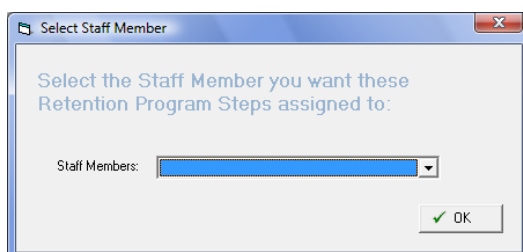
The dialog box is titled "Add Person to Retention Program". It contains a text field labeled "Customer:" with the value "JOHN BLACK". Below this is a section titled "Select the Retention Program you wish this Customer to join:". Inside this section is a dropdown menu labeled "Retention Program:" with the value "NEW CUSTOMER". At the bottom right are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Then this screen displays



The dialog box is titled "Point of Sale". It contains a text area with the message "Are you sure you want 'JOHN BLACK' to join the Retention Program: NEW CUSTOMER?". At the bottom right are two buttons: "Yes" and "No".

If the program you have selected has steps that are assigned to an individual sales staff member then the following screen will appear where you can select which staff member you wish the steps to be assigned to.



The dialog box is titled "Select Staff Member". It contains a text area with the message "Select the Staff Member you want these Retention Program Steps assigned to:". Below this is a dropdown menu labeled "Staff Members:". At the bottom right is an "OK" button with a green checkmark icon.

Assigning Students to a Program

Students like members or visit pass holders can be assigned to a program. There may be a different program for students and this is depicted by the class types and settings that are assigned to the program in its initial setup. If you only have 1 program that is allocated to students then only this one program will be shown in the booking screen. The drop down is available from the bottom left hand side of the create student booking screen.

Create Student Booking

Class Details

Class Level: MINNOW Day: Wednesday Start Time: 10:00 AM
 Teacher: UNCONFIRMED, UNCONFIRMED End Time: 10:30 AM
 Area: LP1

Booking Type

☐ Term ☒ Direct debit
☒ Perpetual
☐ Makeup ☐ Casual

Student Details

Student No.: 102737 Age: 2yrs 4mths
 Name: BLACK, MITCHELL
 Responsible Person: BLACK, JOHN

Booking Details

From: 6 AUG 2008 D
 Consultant: 1 TRAINING, TRAINING

Fees

Discounts/Concessions

Discount: 0 %
 (first child, first class)
☐ Concession

Joining fee: \$ 0.00 Fee per class \$ 65.00
 + Pro rata: \$ 260.00 ? ☐ Include next period
 - Discount: \$ 0.00 Next Period 01 Jun 2005

Pay now

= Due: \$ 260.00 Family Credit: \$ 0.00
 Amount in Credit: Amount to pay: \$ 0.00

Sales Program: NEW CUSTOMER

Vacancy Information

Au	Au	Au	Au	Se	Se	Se	Se	Oc	Oc	Oc	Oc	Oc	No	No	No	No	De	De	De	De	De	Ja	Ja	Ja	Ja	Fe	Fe	Fe
6	13	20	27	3	10	17	24	1	8	15	22	29	5	12	19	26	3	10	17	24	31	7	14	21	28	4	11	18

☐ = Vacancy ☐ = Fully Booked
☐ = Vacancy Filled by Make Up ☐ = Public Holiday

OK Cancel

Managing your programs

Steps due today

When you setup a program any steps that are due on that day or due within a number of days from the start date, will pop up on the screen for you to action immediately. For example, a centre tour is the first item booked for a prospect. As soon as the prospect is entered and the record is saved the following screen appears:

Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Not Completed** Step Due: 13 Aug 2008

Program Name: NEW ENQUIRY

Step #: 1

Step Name: Tour

Date Started: 6 AUG 2008 D

Date Due: 13 AUG 2008 D

Assign To: ☒ Sales Staff ☐ By Role TRAINING, TRAINING

Action: Appointment

Action : Appointment Booking

☐ Appointment ☐ Facility ... HEALTH CLUB

No Appointment Booking has been made.

Description:

Date Created: 6 AUG 2008

Created By: TRAINING TRAINING

Comments:

Book Appointment Delete Step Skip Step Complete Step OK Cancel

At anytime that you open the prospect or customer marketing screen, if a step is due today or from today onwards it will display as requiring action. You can either make a comment on this screen or click OK to complete it at another stage or action the step at the time.

Booking Appointments from the steps screen

Book
Appointment

Clicking on the button will take you through to the appointments screen or the facility booking search screen depending on the appointment type setup. You will see below that this takes you through to the facility search screen where dates/times can be selected to narrow your search.

The screenshot shows a window titled "Visual Scheduler Filters". It contains several sections for filtering search results:

- Available:** A list box on the left shows "Centre Facilities". To its right are four buttons: ">>", ">", "<", and "<<".
- Selected Facility Name:** A text box containing "HEALTH CLUB".
- Date Range:** Two "Between:" labels followed by date input fields. The first field contains "6 AUG 2008" and the second contains "6 AUG 2008". Each field has a "D" button next to it. An "and:" label is between the two date fields. Below these is an "Apply" button.
- Results:** A table with the following headers: "Facility", "Date", "From Time", and "To Time". The table body is currently empty.
- Buttons:** At the bottom left is a "Select All" button. At the bottom right is a "Book Selected" button. A "Close" button is at the very bottom right.

1. Enter available times to and from
2. Click on

Apply
3. The times available will be displayed in the results pane
4. Click on the booking time you wish to accept and click on

Book Selected


Results			
Facility	Date	From Time	To Time
<input checked="" type="checkbox"/> HEALTH CLUB	Wed 06 Aug 2008	08:00 AM	08:30 AM
<input type="checkbox"/> HEALTH CLUB	Wed 06 Aug 2008	08:30 AM	09:00 AM
<input type="checkbox"/> HEALTH CLUB	Wed 06 Aug 2008	09:00 AM	09:30 AM
<input type="checkbox"/> HEALTH CLUB	Wed 06 Aug 2008	09:30 AM	10:00 AM

☐ Select All

Not Completed Steps

When a step has had no action made against it, and it is not yet overdue its status will be not completed.

Example:


Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Not Completed**

Program Name:

Step #:

Step Name:

Pending Steps

When an appointment is booked, but the appointment is in the future, the status is marked as pending.

Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Pending**

Program Name: NEW ENQUIRY

Step #: 1

Step Name: Tour

Assign To: ☒ Sales Staff ☐ By Role TRAINING, TRAINING

Action: Appointment

Action : Appointment Booking

☐ Appointment

☒ Facility ... HEALTH CLUB

Facility Booking
Booking Name: HEALTH ASSESSMENT
Date: 07 Aug 2008 Time: 8:00:00 AM
Attended: No

Description:

Comments:

Date Started: 6 AUG 2008 D

Date Due: 13 AUG 2008 D

Date Created: 6 AUG 2008

Created By: TRAINING TRAINING

Delete Step Skip Step Complete Step OK Cancel

Missed Appointment Steps

If an appointment has been booked against a step but then the appointment is then not attended the status will be automatically changed to Missed Appointment. These steps will then show as Missed Appointments in the Management screen.

Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Missed Appt**

Program Name: NEWFAMEM

Step #: 1

Step Name: Health Assessment

Date Started: 13 AUG 2008 D

Date Due: 13 AUG 2008 D

Assign To: ☒ Sales Staff ☐ By Role TRAINING, TRAINING

Action: Appointment

Action : Appointment Booking

☐ Appointment

☒ Facility ... HEALTH CLUB

Appointment has been Missed

Facility Booking
Booking Name:
Date: 06 Aug 2008 Time: 8:00:00 AM
Attended: No

Description:

Comments:

Date Created: 6 AUG 2008

Created By: TRAINING TRAINING

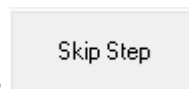
Delete Step Skip Step Complete Step OK Cancel

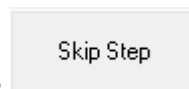
Rebooking a missed appointment

To rebook a missed appointment, go into appointments or facility bookings and cancel and rebook the appointment without leaving the screen. The missed appointment will disappear from the missed appointment list and the step the appointment is linked to will be updated.

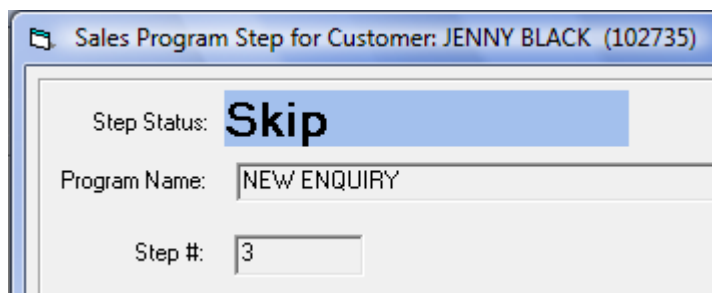
Skipping steps

In some cases steps will not be required, for example a customer does not want to complete a program show as they have been a regular trainer for a long time, but would still like a program written for them.



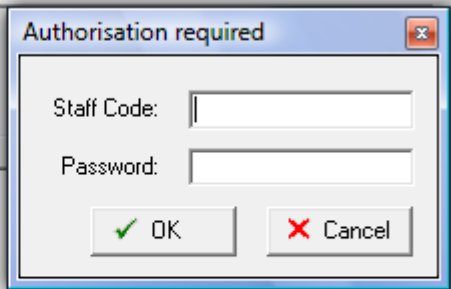
To skip a step click on the  button at the bottom of the step for a customer screen

The status will now show as skipped

A screenshot of a software window titled "Sales Program Step for Customer: JENNY BLACK (102735)". Inside the window, there are three fields: "Step Status:" with the value "Skip" highlighted in blue, "Program Name:" with the value "NEW ENQUIRY", and "Step #:" with the value "3".

Deleting steps

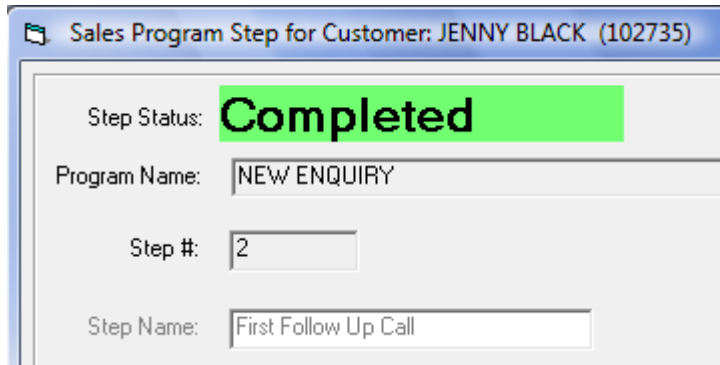
There may be cases where a step is deleted. In this case you must be a sales manager to delete a step. A deleted step will be removed; however the action of the deletion will be trapped in the customer changes log for the program. See System Settings section for marking staff as sales managers.

A screenshot of a software interface showing a dialog box titled "Authorisation required". The dialog box has two input fields: "Staff Code:" and "Password:". Below the fields are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon. In the background, a portion of the main interface is visible, showing buttons for "Delete Step", "Skip Step", and "Cor".

Completing steps

In some cases a step will be completed automatically, for example when a SMS or letter is sent the step is marked as completed, or when an appointment is attended. For In Person, Phone Call and Start up Pack type steps, the complete step button will need to be used to complete the step.

Note: This is also done in bulk through the management screen



Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Completed**

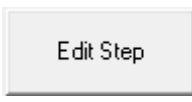
Program Name: NEW ENQUIRY

Step #: 2

Step Name: First Follow Up Call

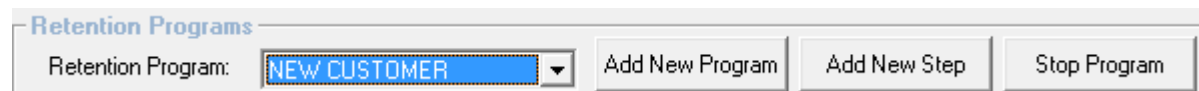
Editing Steps

Once a step has been completed it can be edited if required. Any changes to the step are trapped in the changes log. Editing the step removes any previous completion or skipping, and returns the status back to Not Completed.

By clicking on the  the status will be returned to **Not Completed**

Adding a step

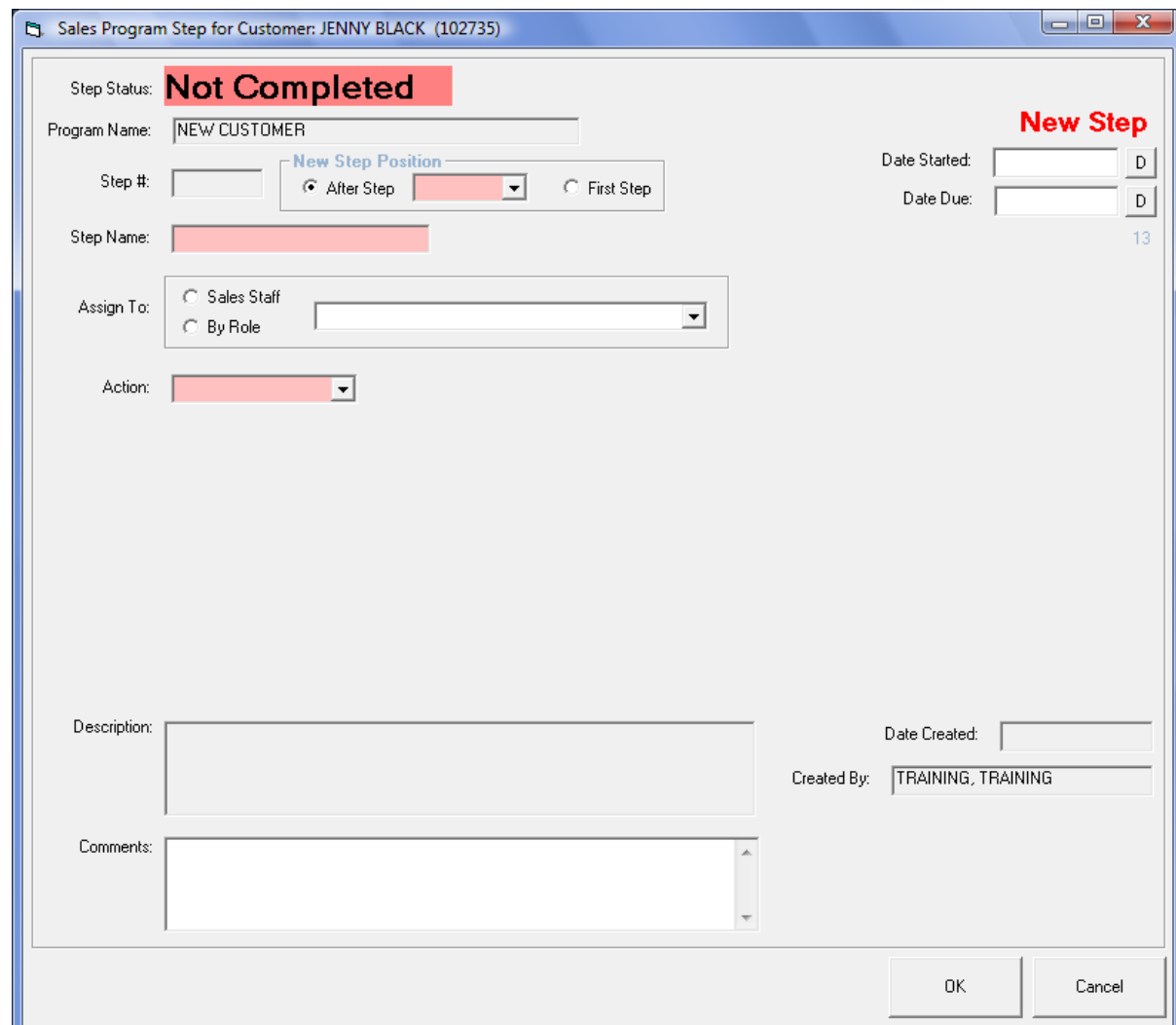
You can manually add a step for an individual customer. This will affect only the customer it is set for. This is complete from either the prospect or customer marketing screen.



Retention Programs

Retention Program: **NEW CUSTOMER** Add New Program Add New Step Stop Program

1. Click on **Add New Step**
2. The steps screen will now be displayed
3. Complete the fields as you would for setting up a step for the entire program
4. You will need to select the position the step takes based on which step it follows
5. A description cannot be entered for a step entered on the fly only comments
6. An example of such a step may be an extra follow up call or extra free program show



Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Not Completed**

Program Name: **NEW CUSTOMER**

Step #:

New Step Position

☒ After Step ☐ First Step

Date Started: D

Date Due: D

Step Name:

Assign To: ☐ Sales Staff ☐ By Role

Action:

Description:

Comments:

Date Created:


Created By: **TRAINING, TRAINING**

13

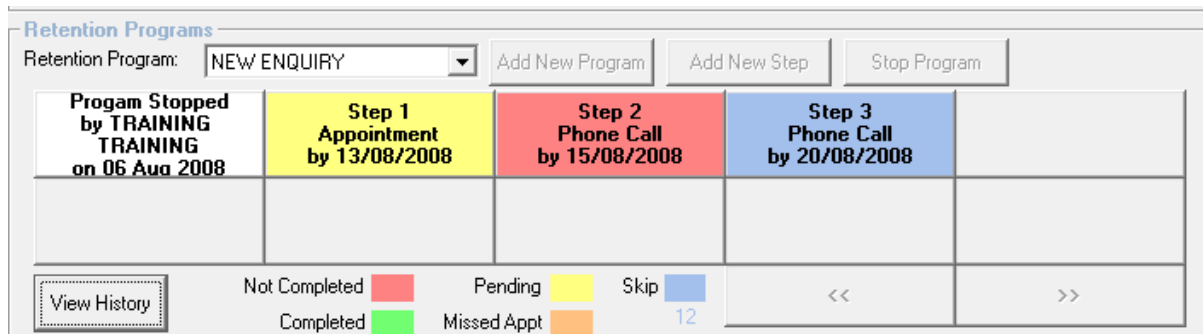
OK Cancel

Stopping a program

Prospect programs will be stopped when that customer is sold a membership. You can also choose to manually stop a program, for example the prospect turns to a dead lead.

To stop a program click on the  button above the displayed steps. You will see that the first cell is now displaying the programs status

Note: You must be a sales manager to stop a program manually



The interface shows a 'Retention Programs' window. At the top, there is a dropdown menu for 'Retention Program' set to 'NEW ENQUIRY', and three buttons: 'Add New Program', 'Add New Step', and 'Stop Program'. Below this is a table with four columns representing steps in a program. The first column is labeled 'Program Stopped by TRAINING TRAINING on 06 Aug 2008'. The second column is 'Step 1 Appointment by 13/08/2008' (yellow background). The third column is 'Step 2 Phone Call by 15/08/2008' (red background). The fourth column is 'Step 3 Phone Call by 20/08/2008' (blue background). Below the table is a 'View History' button and a legend for step statuses: Not Completed (red), Pending (yellow), Skip (blue), Completed (green), and Missed Appt (orange). There is also a counter '12' and navigation arrows '<<' and '>>'.

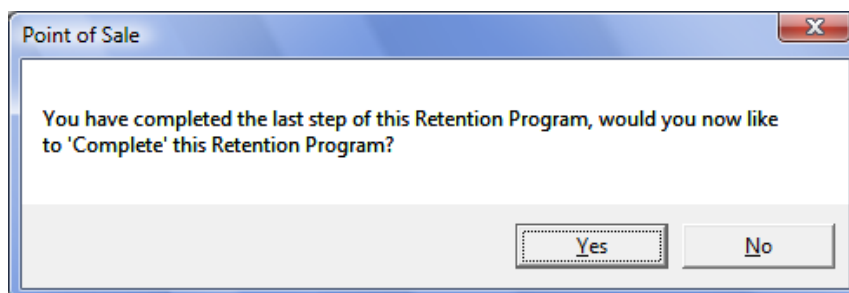
Program Stopped by TRAINING TRAINING on 06 Aug 2008	Step 1 Appointment by 13/08/2008	Step 2 Phone Call by 15/08/2008	Step 3 Phone Call by 20/08/2008

View History Not Completed Pending Skip Completed Missed Appt 12 << >>

Completing a program

Whenever the last step in the program is actioned, either completed or skipped you will be asked if you wish to complete the program. The internal status for reporting is different between completed and stopped. Completed means that everything that was required to be done is considered done, whereas stopped shows that certain parts of the program were forgone.

Upon actioning of the last step the following message will be displayed



A 'Point of Sale' dialog box with a title bar and a close button. The message inside says: 'You have completed the last step of this Retention Program, would you now like to 'Complete' this Retention Program?'. At the bottom are two buttons: 'Yes' and 'No'.

You have completed the last step of this Retention Program, would you now like to 'Complete' this Retention Program?

Yes No

If you click YES the program will be marked as completed. Selecting NO will leave it as uncompleted and even though all steps may be completed, it will not be seen as completed from a reporting point of view.

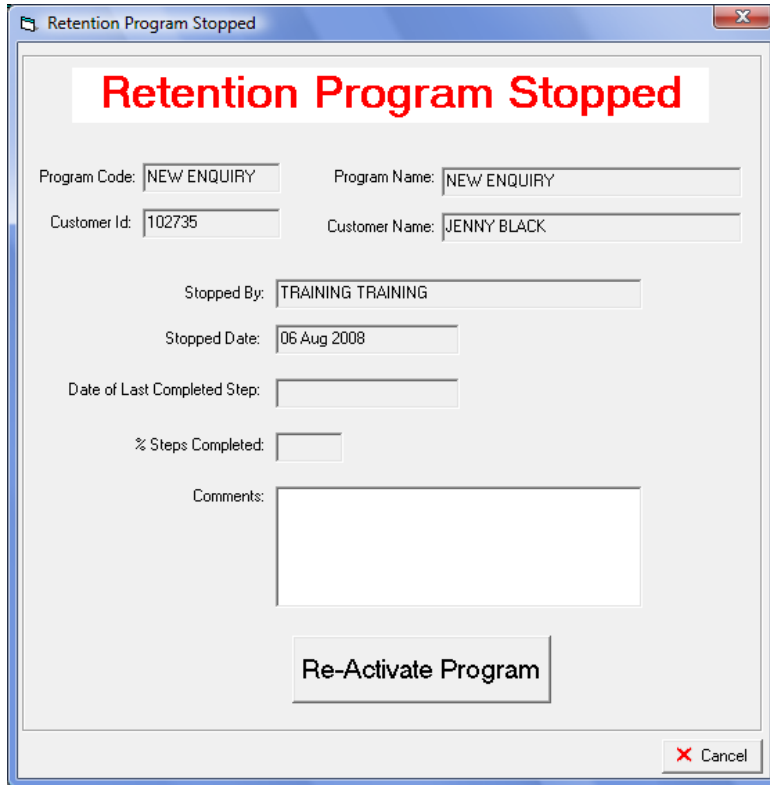


The interface shows the same 'Retention Programs' window as before, but the first column now says 'Program Completed by TRAINING TRAINING on 06 Aug 2008'. The other steps remain the same: 'Step 1 Appointment by 13/08/2008' (yellow), 'Step 2 Phone Call by 15/08/2008' (red), and 'Step 3 Phone Call by 20/08/2008' (green).

Program Completed by TRAINING TRAINING on 06 Aug 2008	Step 1 Appointment by 13/08/2008	Step 2 Phone Call by 15/08/2008	Step 3 Phone Call by 20/08/2008

Reactivating a program

In some cases a program may have been accidentally stopped or completed. If a staff member has the appropriate rights (sales manager), they can click on the white Program Completed Button and the following screen will appear. Click on the RE-ACTIVATE PROGRAM button to activate.



The screenshot shows a Windows-style dialog box titled "Retention Program Stopped". At the top, the title bar says "Retention Program Stopped" with a close button. The main content area has a red header "Retention Program Stopped". Below this, there are several input fields: "Program Code:" with "NEW ENQUIRY", "Program Name:" with "NEW ENQUIRY", "Customer Id:" with "102735", and "Customer Name:" with "JENNY BLACK". Below these are "Stopped By:" with "TRAINING TRAINING", "Stopped Date:" with "06 Aug 2008", "Date of Last Completed Step:" (empty), and "% Steps Completed:" (empty). There is a "Comments:" label followed by a large text area. At the bottom center is a button labeled "Re-Activate Program". In the bottom right corner, there is a "Cancel" button with a red 'X' icon.

Program Code:	NEW ENQUIRY	Program Name:	NEW ENQUIRY
Customer Id:	102735	Customer Name:	JENNY BLACK
Stopped By:	TRAINING TRAINING		
Stopped Date:	06 Aug 2008		
Date of Last Completed Step:			
% Steps Completed:			
Comments:			

Re-Activate Program

Cancel

Viewing Programs on an Individual Basis

Programs can be viewed in both the Customer Marketing and Prospect screens. The most active program will be displayed by default and then you can switch to other programs if required. For example a customer is now a member but was in the past a prospect. Their prospect program is still viewable by changing the drop down, however by default their membership retention program is displayed.

Customer Marketing Details // Customer ID - 102735

Customer Id: 102735 Name: BLACK JENNY G: F

Info | Marketing | Other | Extras | Appointments | Guest Pass | Referral | **Tracking** | Children

Date: Staff: Reason: Method: Comment:

Show Contacts Show Sales Steps

New Next Previous

Export / Print

From: To : Show

Retention Programs

Retention Program: NEW CUSTOMER Add New Program Add New Step Stop Program

Step 1 Phone Call by 9/08/2008	Step 2 Email by 13/08/2008	Step 3 SMS by 8/09/2008	Step 4 Session by 14/08/2008	Step 5 Letter by 2/02/2009
View History	Not Completed Completed	Pending Appt Missed Appt	Skip	13

Each of the steps can be viewed for further information or actioning by clicking on the button.

For example, by clicking on Step 3 SMS the following screen will appear:

Sales Program Step for Customer: JENNY BLACK (102735)

Step Status: **Not Completed**

Program Name: NEW CUSTOMER

Step #: 3

Step Name: 30 day SMS

Assign To: ☒ Sales Staff ☐ By Role TRAINING, TRAINING

Action: SMS

SMS Template

Description: 30 DAY SMS

SMS: Hello <<CustFirstName>>, You've made 30 days!! Congratulations

Mobile: Send SMS

Description:

Comments:

Date Started: 8 SEP 2008

Date Due: 8 SEP 2008

Date Created: 6 AUG 2008

Created By: TRAINING TRAINING

Delete Step Skip Step Complete Step OK Cancel

Hint: Click on SMS to send this SMS manually. If the mobile number is not here, you can add it and it will update to the customer profile.

If you choose not to send an SMS you can select any of the buttons with the action you would like to do.

Viewing past actions

Once steps are actioned and completed, the details are displayed in the top section of the tracking screen. The show contacts and show sales steps buttons switch between manual actions created and those that are contacts based on the steps of a retention program.

You can see in the below screen that a contact log entry for swim lessons discussions is displayed

Info | Marketing | Other | Extras | Appointments | Guest Pass | Referral | Tracking | Children

Contact Log

Date: 29/07/2007 4:32:00 PM

Staff: TRAINING, TRAINING

Reason: Concerned about childs development

Method: phone

Comment: Spoke to Jenny as her daughter does lessons with Sara Jane and wasn't happy with the level of development. I explained

Show Contacts Show Sales Steps

New Next Previous

Export / Print

From: To :

Show

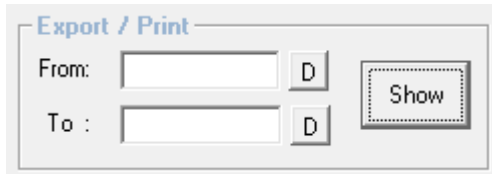
If you then click on the **Show Sales Steps** button you will see now that the past completed steps are displayed

Info	Marketing	Other	Extras	Appointments	Guest Pass	Referral	Tracking	Children
Sales Program: NEW ENQUIRY Step Nbr: 3								
Date Due:	20/08/2008			Show Contacts		Show Sales Steps		
Staff:	BLACKJENNY			New		Next		Previous
Step Name:	2nd Follow Up Call							
Action:	Phone Call			Export / Print				
Comment:				From:			D	Show
				To :			D	

Exporting & Printing History of Contacts

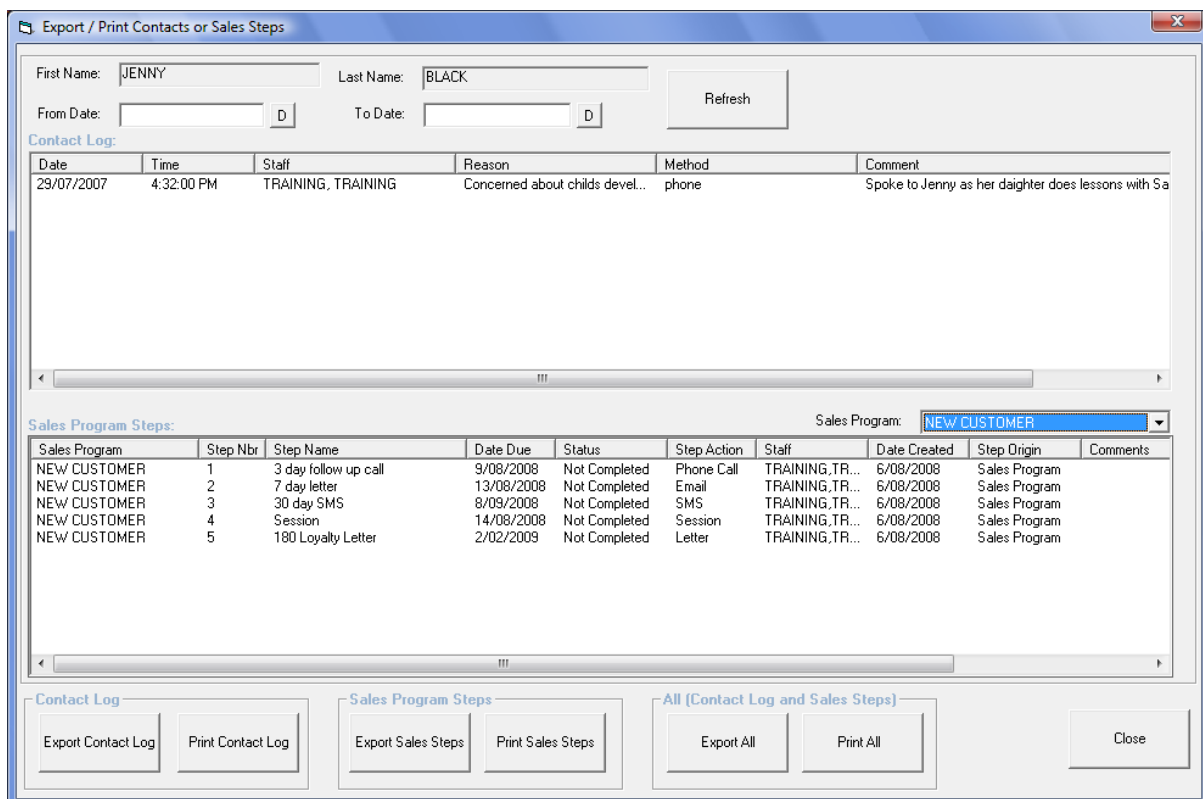
You can export and print the contact logs and sales steps as required.

1. Click on the SHOW button



The dialog box titled "Export / Print" contains two date selection fields. The first field is labeled "From:" and the second is labeled "To :". Each field has a text input box followed by a small button labeled "D". To the right of these fields is a button labeled "Show".

2. The following screen will display



The window titled "Export / Print Contacts or Sales Steps" displays contact information and a list of sales program steps.

Contact Information:

First Name: JENNY Last Name: BLACK

From Date: [] D To Date: [] D Refresh

Contact Log:

Date	Time	Staff	Reason	Method	Comment
29/07/2007	4:32:00 PM	TRAINING, TRAINING	Concerned about childs devel...	phone	Spoke to Jenny as her daughter does lessons with Sa

Sales Program Steps:

Sales Program: NEW CUSTOMER

Sales Program	Step Nbr	Step Name	Date Due	Status	Step Action	Staff	Date Created	Step Origin	Comments
NEW CUSTOMER	1	3 day follow up call	9/08/2008	Not Completed	Phone Call	TRAINING, TR...	6/08/2008	Sales Program	
NEW CUSTOMER	2	7 day letter	13/08/2008	Not Completed	Email	TRAINING, TR...	6/08/2008	Sales Program	
NEW CUSTOMER	3	30 day SMS	8/09/2008	Not Completed	SMS	TRAINING, TR...	6/08/2008	Sales Program	
NEW CUSTOMER	4	Session	14/08/2008	Not Completed	Session	TRAINING, TR...	6/08/2008	Sales Program	
NEW CUSTOMER	5	180 Loyalty Letter	2/02/2009	Not Completed	Letter	TRAINING, TR...	6/08/2008	Sales Program	

Export / Print Options:

Contact Log Export Contact Log Print Contact Log

Sales Program Steps Export Sales Steps Print Sales Steps

All (Contact Log and Sales Steps) Export All Print All

Close

3. Choose your filter options if required
4. Choose the Retention program if required
5. Choose one of the export or print options

Viewing history of program changes

Anytime a step is actioned, deleted, skipped or steps are added this is recorded in the changes log.

View History

This log is viewable from the button left of the seen steps

Retention Programs

Retention Program: **NEW ENQUIRY**

Program Stopped by TRAINING TRAINING on 06 Aug 2008	Step 1 Appointment by 13/08/2008	Step 2 Phone Call by 15/08/2008

Not Completed ■ Pending Appt ■ Skip ■
Completed ■ Missed Appt ■ 12

Retention Program History

Program Code: **NEW ENQUIRY** Program Name: **NEW ENQUIRY** 12

Customer Id: **102735** Customer Name: **JENNY BLACK**

Date	Time	By Staff	Reason	Step Nbr	Step Name	Step Action	Comments
06 Aug 2008	5:17:00 PM	TRAINING TRAINING	Program Started				
06 Aug 2008	5:53:00 PM	TRAINING TRAINING	Facility Appointment Booked	1	Tour	Appointment	
06 Aug 2008	5:58:00 PM	TRAINING TRAINING	Facility Appointment Booked	1	Tour	Appointment	
06 Aug 2008	6:05:00 PM	TRAINING TRAINING	Step Added	3	2nd Follow Up Call	Phone Call	
06 Aug 2008	6:07:00 PM	TRAINING TRAINING	Step Skipped	3	2nd Follow Up Call	Phone Call	
06 Aug 2008	6:09:00 PM	TRAINING TRAINING	Step Added	4	Last chance SMS	SMS	
06 Aug 2008	6:24:00 PM	TRAINING TRAINING	Step Deleted	4	Last chance SMS	SMS	
06 Aug 2008	6:24:00 PM	TRAINING TRAINING	Step Completed	2	First Follow Up Call	Phone Call	
06 Aug 2008	6:25:00 PM	TRAINING TRAINING	Step Edited	2	First Follow Up Call	Phone Call	
06 Aug 2008	6:28:00 PM	TRAINING TRAINING	Program Stopped				
06 Aug 2008	6:31:00 PM	TRAINING TRAINING	Program Re-Activated				
06 Aug 2008	6:31:00 PM	TRAINING TRAINING	Step Edited	3	2nd Follow Up Call	Phone Call	
06 Aug 2008	6:31:00 PM	TRAINING TRAINING	Step Completed	3	2nd Follow Up Call	Phone Call	
06 Aug 2008	6:33:00 PM	TRAINING TRAINING	Program Completed				
06 Aug 2008	6:35:00 PM	TRAINING TRAINING	Program Re-Activated				
06 Aug 2008	6:38:00 PM	TRAINING TRAINING	Program Stopped				Prospect Program STOPPED, customer has be

Customer Correspondence

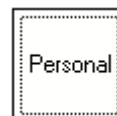
If a customer does not want to receive emails or SMS's then the steps assigned with those actions will be automatically skipped.

Retention Programs

Retention Program: **NEW CUSTOMER** Add New Program Add New Step Stop Program

Step 1 Phone Call by 9/08/2008	Step 2 Email by 13/08/2008	Step 3 SMS by 8/09/2008	Step 4 Session by 14/08/2008	Step 5 Letter by 2/02/2009

View History Not Completed Completed Pending Appt Missed Appt Skip 13 << >>



To set this go into the customer's marketing details, select **Personal** which will take you the customer set up screen. There select tab 'Others' and then mark the correspondence the customer wishes to receive.

Correspondence

- ☒ All Correspondence
- ☒ Links Emails
- ☒ Links SMS

Daily Management from the Management Screen

Marking items as completed

On the bottom left hand corner of the Retention management screen is **Tasks To Do**. In this screen any tasks that have been set will show up here.

Tasks To Do			
Tasks List			
Date	Task	Type	Completed
15/10/2008	Cleaning checklist compl...	In person	<input type="checkbox"/>
15/10/2008	Missed gym appointment...	Phone Call	<input type="checkbox"/>
14/10/2008	Missed gym appointment...	Phone Call	<input type="checkbox"/>

If an item is highlighted in red that 'Task To Do' is overdue.

To complete a task click the completed box next to the task and it will be deleted from the screen. The same task may pop up again if it is a reoccurring task. E.g. weekly, fortnightly etc

Non Attendance

The Non-Attendance screen is also in the Retention Management screen. It will show members who have not attended for the number of days specified.

E.g. In this example, at 30 days non attendance a phone is the action required.

Non-Attendance

30 days (708)

90 days (632)

180 days (5098)

Non Attendance - Phone Call

Name	Complete	Home Phone	Last Visit
▶ ABDULLAH, ABDULL...	<input type="checkbox"/>	0425842600	08/08/20
ABDULLAHI-MOHAM...	<input type="checkbox"/>	0434447068	25/08/20
ABDULLAHI-MOHAM...	<input type="checkbox"/>	<No Phone Numb...	14/08/20
AGGETT, CHRISTOP...	<input type="checkbox"/>	98963023	25/07/20
AHAMED AL KUWAI...	<input type="checkbox"/>	0450451690	22/08/20
AHMED, AHMED	<input type="checkbox"/>	0424630996	01/09/20
AITKEN, HEATHER	<input type="checkbox"/>	93984815	28/07/20
AL-BOUTHABET, ALI	<input type="checkbox"/>	0422 610 726	07/08/20

Once a person has been contacted by the action required, by clicking the complete box next to their name their name will disappear off the list.

Bulk E-Mails, SMS and Letters

If an email, SMS or letter is set for any of the non attendance, these options can be actioned in bulk.

E.g. In this example, at 90 days non attendance an email is the action required. By selecting the whole list everyone in the list who has an email will receive an email.

Non-Attendance

30 days (706) **90 days (632)** 180 days (5098)

Non Attendance - Email		
Name	Send	E-Mail
▶ Dorbolo, RENEE	<input checked="" type="checkbox"/>	<No Email Address>
* MATTHEW	<input checked="" type="checkbox"/>	<No Email Address>
ABDO, OMAR	<input checked="" type="checkbox"/>	<No Email Address>
ABERI, TERRI	<input checked="" type="checkbox"/>	<No Email Address>
ABOU-ZEID, MOHAM...	<input checked="" type="checkbox"/>	<No Email Address>
ABRAHAMSON, JESS	<input checked="" type="checkbox"/>	<No Email Address>

< [Progress Bar] >

Email

Viewing customer records

From the Management Screen

In the retention management screen if you would like to view a customer's record you can right click on the customer's name and select 'Show marketing details' which will take you to their profile.

From


Appointments to book, Calls to make, Letters, Emails and SMS's to send

App to Book (0)	Calls (0)	Letters (0)	Emails (0)	SMS (0)
-----------------	------------------	-------------	------------	---------

These tabs appear across the top of the management screen. By selecting a tab any appointments, calls, letters, emails or SMS's that need to be actioned will show up in the screen. By viewing the due date next to the name, you will see when the action is due.

Current & Missed Appointments

By selecting either:

 Show Missed Appointments  Show Today's Appointments

It will either show missed appointments or that day's appointments.

To rebook a missed appointment, right click on the person's name, view the customer's appointment details, from there go into the appointment screen and drag the person's appointment into an available timeslot. Missed appointments can only be moved within the week displayed.

Doing this changes the appointment status to pending again. In the booking is a facility booking then you can change the details in the booking screen.

Reporting on your programs

Average time as a member

Reporting>Retention>average time as a member

This report prints a list of current memberships, showing the length of time for each membership. If the membership has been renewed within the “Days between memberships” then those days are included in the length of time. This report also shows the average length of time for memberships shown by membership types.

In the selection criteria enter the date that you would like the report to run up to, i.e. it will show members who started before this date.

By selecting Show summary only the report will be refined to only show the membership type and numbers.

You can choose how many days between memberships you would like to include in the report.

Selection Criteria

Show Members who started before: D

☐ Show Summary only

Days between Memberships:

By selecting the Category and Type as shown below, you determine what memberships the report will include.

Select Membership Type(s)

Category:

- ☒ DD
- ☒ TM

Type:

Code	Description	Pay Typ
<input checked="" type="checkbox"/> 12GOLF	12 Month ALGC and BAYFIT Membership	UT
<input checked="" type="checkbox"/> 15DAYM...	15 Day Trial Membership	UT
<input checked="" type="checkbox"/> 28TRAIL	28 Day Trial	UT
<input checked="" type="checkbox"/> 3MONT...	Buy Three Months Get Three for Free	UTPP
<input checked="" type="checkbox"/> AQA03	aqua aerobics 3 month pass	UT

Perpetual\Term

☒ All

☐ Perpetual only

☐ Term Only

☒ Select All

☒ Select All

Average time of cancelled members

Reporting>Retention>average time of cancelled members

This report prints a list of cancelled memberships, showing the length of time for each membership. Once again, if the membership has been renewed within the “Days between memberships” then those days are included in the length of time. The report shows the average length of time for memberships shown by membership types.

For information on how to run this report please see **Average time as a Member**.

No Sale Return Report

Report.link>RetentionMenu>No Sale Return

This report shows the number of customers who did not purchase a membership within the timeframe set by the business operator which is calculated from the end of a tour appointment or the first appointment in a prospect program but do return to purchase a membership. The report also shows the number of customers that purchased a membership within the set timeframe.

Retention No Sale Return Report

Selection Criteria

NSR TimeFrame Retention Setting

The 'No Sale Return Timeframe' is the time in minutes from completion of the first appointment within a Prospect Program to selling a Membership.

No Sale Return Timeframe: Hrs: Mins:

Date Range for when Appointment Step was completed

From Date: D To Date: D

Print
Export
Graph
Preview ...
Close

Program Usage Analysis

Report.link>RetentionMenu>ProgramUsageAnalysis

This report shows by numbers of attendances in a specified date range which is displayed either in a daily, weekly, fortnightly tally etc, members attending the centre who are on retention program and which program that is and attendances for those members who are not on a retention program.

Note this is for memberships and visit passes only.

The screenshot shows a software window titled "Retention Program Usage Analysis Report". The window contains several sections for configuring the report:

- Selection Criteria**: Includes a "Tally By" section with radio buttons for Day (selected), Week, Fortnight, Month, and Quarter.
- for Attendances between**: Two date input fields, each followed by a "D" button, separated by the word "and".
- Select to include Memberships and/or Visit Passes**: Two checkboxes, "Include Memberships" and "Include Visit Passes", both of which are currently unchecked.
- Select Membership Types**: A "Category" list with checkboxes for "DIRECT DEBIT FORTNIGHT", "RESULTS", and "TERM MEMBERSHIPS". To the right is a "Type" table with columns "Code", "Description", and "Pay Type". Below the list is a "Select All" button.
- Select Visit Passes**: A "Category" list with checkboxes for "CASUAL VISIT PASS" and "PERSONAL TRAINING". To the right is a "Type" table with columns "Code" and "Description". Below the list is a "Select All" button.

On the right side of the window, there is a vertical column of buttons: "Print", "Export", "Membership Graph", "Visit Pass Graph", "Preview ...", and "Close".

Sales Person Performance Report

Report.link>RetentionMenu>SalesPersonPerformanceReport

This report will show which steps were completed by each staff member as a tally for the date range entered. The steps are reported on by action type and therefore the tally is categorised by how many phone calls, appointments booked etc each staff member has completed. Therefore overall staff performance can be measured and individual staff members that are performing well can be given recognition.

The screenshot shows a software window titled "Retention Sales Person Performance Report". It features a "Selection Criteria" section with a sub-header "Date Range for completed Retention Steps". Below this, a text box explains: "The Retention Steps selected for this report, are those steps that have a completion date which fall within this date range selected." There are two date input fields: "From Date:" and "To Date:", each consisting of a red rectangular text box followed by a small button labeled "D". To the right of the main content area is a vertical stack of five buttons: "Print", "Export", "Graph", "Preview ...", and "Close".

Retention Prospect Conversion Performance

Report.link>Retention>RetentionProspectConversionPerformance

The step as part of a prospect program at which a prospect is converted to a member, visit pass holder or booked into a class is shown in this report. Prospect programs can then be reviewed for effectiveness and sales staff performance can also be reviewed as you have the option to breakdown by sales staff.

The screenshot shows a software window titled "Retention Prospect Conversion Performance Report". It includes a descriptive text box at the top: "This report shows at which step in the Prospect Program the customer is converted to a Member / VP holder or student." Below this is a "Selection Criteria" section with a sub-header "Date Range when Prospect Program was Stopped". A text box explains: "This is the Date when the Prospect Program has been stopped automatically by Links, as the Customer has purchased either a Membership, Visit Pass or Student Booking. Since the Customer is no longer a Prospect, there is no need to remain on a Retention Prospect Program." There are two date input fields: "From Date:" and "To Date:", each consisting of a red rectangular text box followed by a small button labeled "D". At the bottom, there is a section titled "Breakdown by Staff" containing a checkbox labeled "Breakdown by SalesPerson". To the right of the main content area is a vertical stack of five buttons: "Print", "Export", "Graph", "Preview ...", and "Close".

Glossary

Appointments

Fitness Consultations

An appointment where a member's health and fitness is assessed and recorded by a Gym Instructor.

Program Show

An appointment where a member is shown through their personalised gym program.

Retention

Retention is simply the act of retaining something; using this retention program the aim is to retain as many members as possible.

Prospect

A prospect is a potential member.

Sales Appointments

A prospect attends an appointment at the centre at which they will be toured through the centre and explained member prices and details.

Sales Managers & Sales Staff Members

In staff set up if a person is checked under Sales Manager they have full access to the retention.link program. To have access to the Management Screen you must have Sales selected under Staff Members, Roles. In order a Sales Staff member to be assigned to steps of a member's program they must have Sales selected also.